

1/55

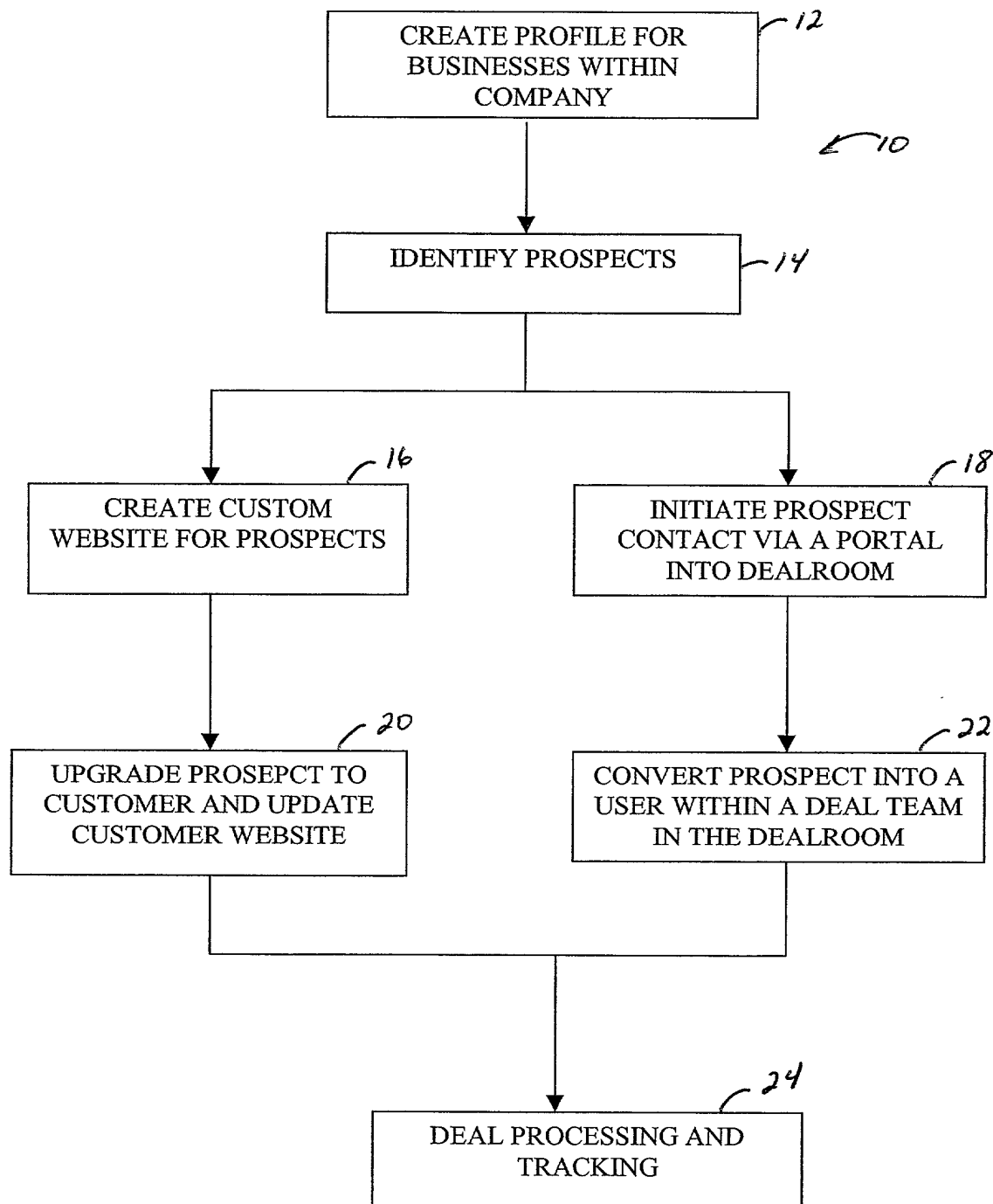


FIG. 1

Figure 2

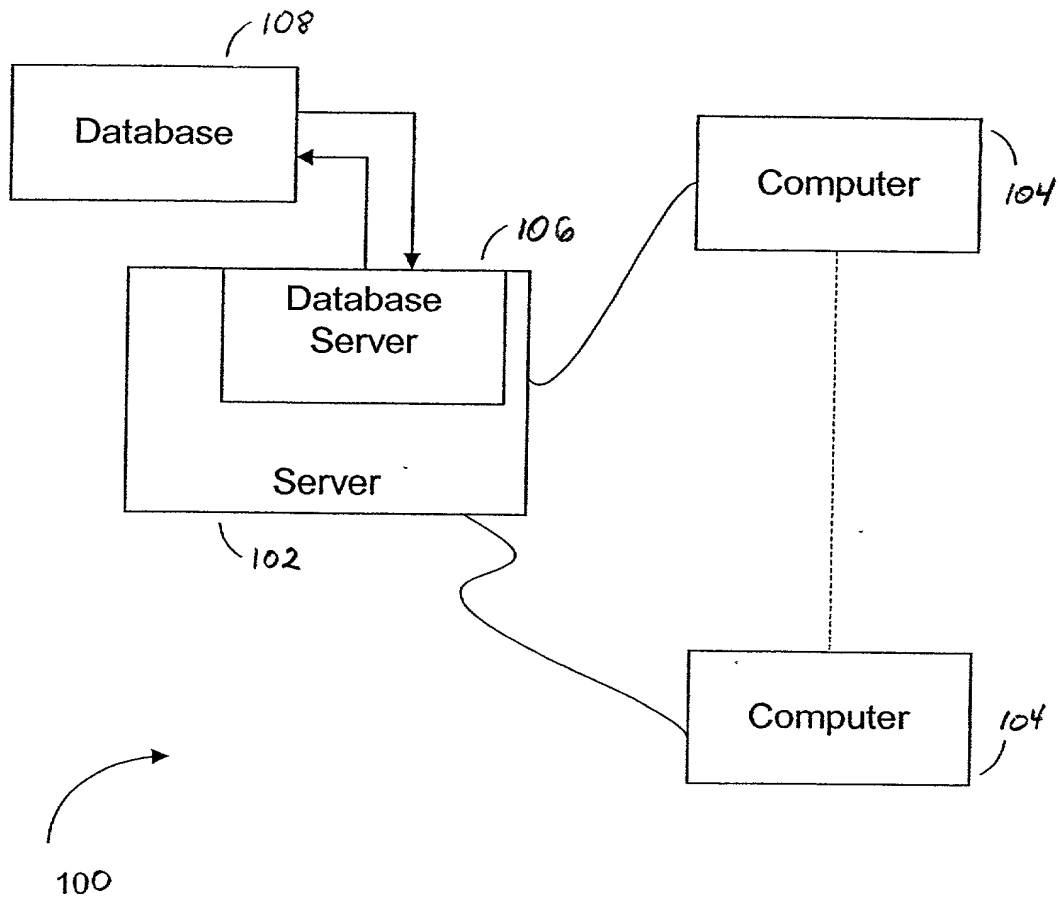
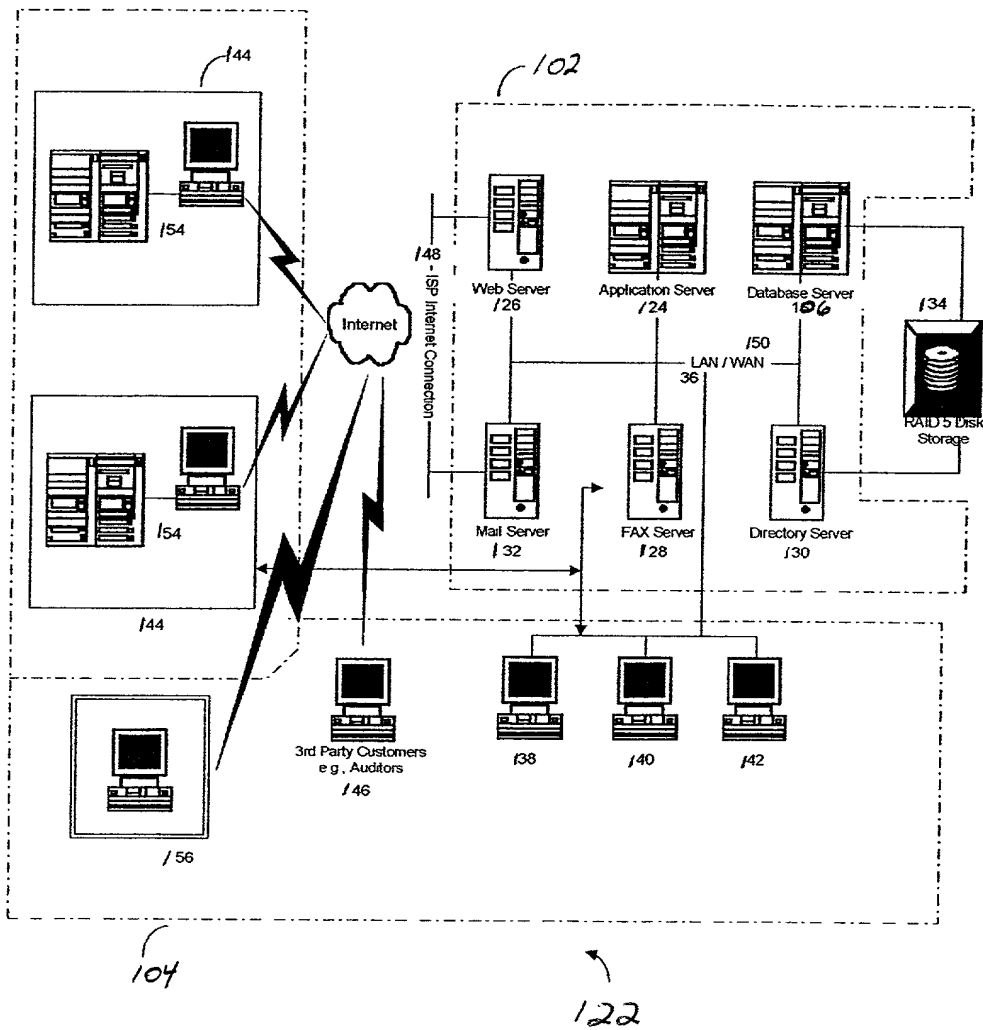


Figure 3



4/55

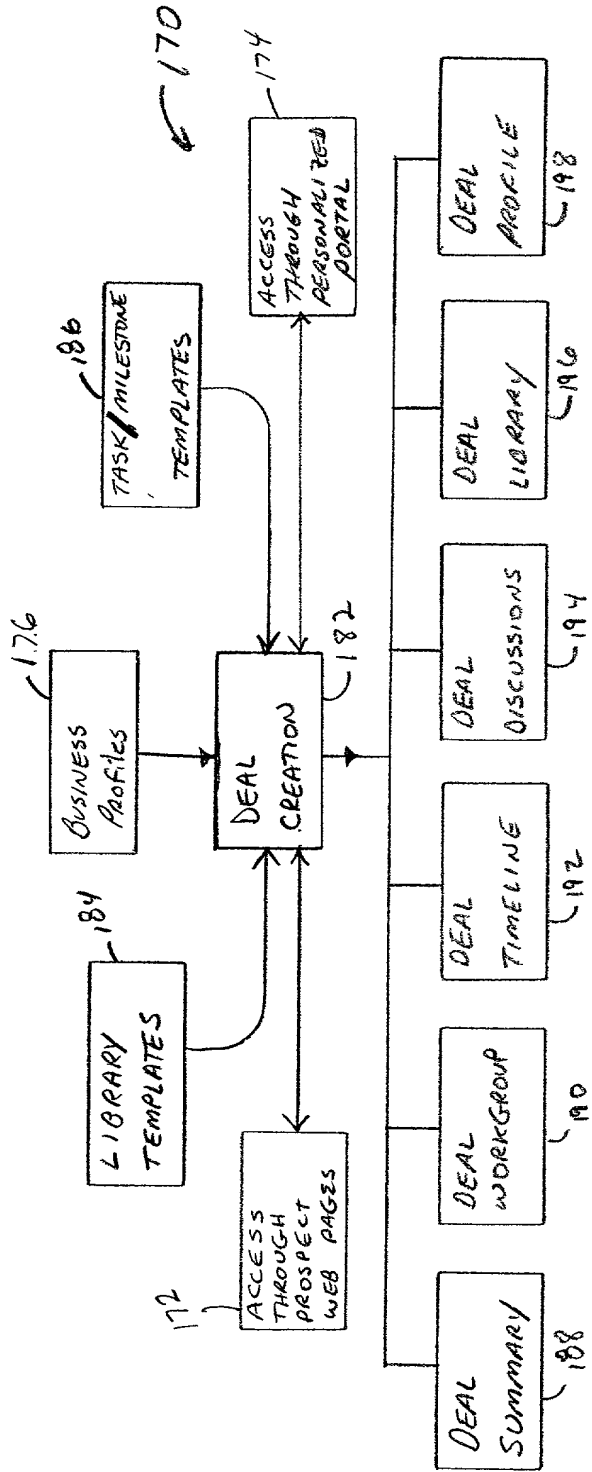


FIG. 4

5/55

200

Business Profile

Business Name:

SFO

Go To Market Name:

SFO

Header Graphic:

SFO.gif

Browse...

Select Functionality:

User Alerts

Deal Groups

View Across Business

Document Search

Deal Search

View Across Division

Invite Prospect

Information Visibility:

Authority Level

Business User

Business Manager

Business Admin

Deal Visibility:

Active Deal

Closed/Lost

View

Modify

Note: 1) This section is the level of information and functionality users in your business. This includes what information is visible to user, what access is provided, and what user can view, and consequently users that they can select from. By selecting the default, all users will only see information associated with their deal type, and the selected group.

2) Permissions selected will apply to Deals within SFA, and any related group.

Authority Level

Authority Level

User

Manager

Admin

Deals

Create

Modify

Delete

View

Timeline/Task Template

Create

Modify

Delete

View

Library/Templates

Create

Modify

Delete

View

Search

Deals

Document

Done

Cancel

Continue

FIG. 5

220

Business Unit Hierarchy

SFG

Division/Sub-Division	Go To Market Name
Energy	Energy
Coal	Coal
Gas	Natural Gas
Pipeline	Pipeline
Telecom	Telecommunications
Cable	Cable
Cellular	Cellular and Wireless
Other Division	

Done

Cancel

FIG. 6

230

Create Division Profile

Division Name:
Energy

Go to Market Name:
Energy

Header Graphic:
SFOLogo.gif

Deal Visibility:
Authority Level
Division User:
Division Manager
Division Admin:

Refresh

Refresh Deal

View

Modify

Close/Lost

View

Close

Cancel

Note: Select users who are at XFL to be the authority level and only "XFL" is selected.

*Field is for internal use only.

FIG 7

8/55

240

Create Sub-Division Profile

Division Name: Energy

Sub-Division Name: Gas

Go to Market Name: Natural Gas

Header Graphic: SFGLogo.gif

Done Cancel

* Field, with an asterisk, are required

FIG 8

260

Library Templates				
Divisions to view: Select View				
Division: Division 1				
Template	Default	Last Modified By	Last Modified	Remove
New Template for Division 1		John	01/01/2000	<input type="checkbox"/>
Template 1	<input checked="" type="checkbox"/>	John	01/01/2000	<input type="checkbox"/>
Template 2		John	01/01/2000	<input type="checkbox"/>
Division: Division 2				
Template	Default	Last Modified By	Last Modified	Remove
Template 1		John	01/01/2000	<input type="checkbox"/>
Template 2	<input checked="" type="checkbox"/>	John	01/01/2000	<input type="checkbox"/>
Division: Division 3				
Template	Default	Last Modified By	Last Modified	Remove
Template 1	<input checked="" type="checkbox"/>	John	01/01/2000	<input type="checkbox"/>
Template 2		John	01/01/2000	<input type="checkbox"/>
Create Template				Remove

FIG. 9

280 →

Create/Modify
Library Template

• Template Name:

• Division:

Select Division

• Description:

☐ Default Template for Division

"Name of Template" Root Folder

Folder 1

Folder 2

Folder 3

Folder 4

Create Folder

Remove

Done

Note: Fields marked with an asterisk are required

FIG. 10

11/55

300



Create/Modify Library Template Folder

Summary Information:

* Parent Folder: Root Folder

* Folder Name:

* Description:

☐ Inherited Folder (Note: Files placed in this folder will automatically inherit the permissions on this folder.)

☐ GE Folder (Note: The sponsoring GE business here will be automatically pre-authorized on this folder.)

Default Permission Information:

Group	Permissions
GE Group	Select Permission
Customer Group	Select Permission
Other	Select Permission

* Fields marked with an asterisk are required

FIG. 11

12/55

320

Templates					
Divisions to view: View All Divisions					
Template	Default	Last Modified By	Last Modified	Copy	Remove
Template1		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Template2		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Template3		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Division: Division 1					
Template	Default	Last Modified By	Last Modified	Copy	Remove
Template1		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Template2		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Division: Division 2					
Template	Default	Last Modified By	Last Modified	Copy	Remove
Template1		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Template2		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Division: Division 3					
Template	Default	Last Modified By	Last Modified	Copy	Remove
Template1		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Template2		John	01/01/2000	<input type="checkbox"/>	<input type="checkbox"/>
Create Template					

FIG. 12

13/55

340

Create/Modify Template
New Template

Template Name: Description:

Division: Select One of the Following:

☐ Default Template for Division

* Fields marked with an asterisk are required

Expand All **Collapse All**

	Customer Request Date	Hide	Remove
<input type="checkbox"/> Mission 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 1		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 2		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 3		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 4		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 5		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 6		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 7		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 8		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 9		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 10		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 11		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 12		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 13		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 14		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 15		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 16		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 17		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 18		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 19		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 20		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 21		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 22		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 23		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 24		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 25		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 26		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 27		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 28		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 29		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 30		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 31		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 32		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 33		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 34		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 35		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 36		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 37		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 38		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 39		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 40		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 41		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 42		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 43		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 44		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 45		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 46		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 47		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 48		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 49		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 50		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 51		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 52		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 53		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 54		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 55		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 56		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 57		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 58		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 59		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 60		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 61		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 62		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 63		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 64		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 65		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 66		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 67		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 68		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 69		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 70		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 71		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 72		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 73		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 74		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 75		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 76		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 77		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 78		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 79		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 80		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 81		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 82		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 83		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 84		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 85		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 86		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 87		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 88		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 89		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 90		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 91		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 92		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 93		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 94		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 95		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 96		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 97		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 98		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 99		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Task 100		<input type="checkbox"/>	<input type="checkbox"/>

Save **Cancel** **Print** **Export** **Import** **Help**

FIG. 13

14/55

360



Create Deal

Select the first letter: **A B C D E F G H I J K L M N O P Q R S T U V W X Y Z**

Or

Search:

Begin With: **C**
Contains: **C**

Search
New Company

Company Name:

LeadSure
Espe Financial
XYZ Data Systems

Deal Name:

Timeline Template:

Default Timeline Template

A description for the template will appear here

Library Template:

Default Library Template

A description for the template will appear here

Cancel **Cancel**

FIG. 14

15/55

380

FIG. 15

View Project Summary

LoadSure Deal 2 - LoadSure

Summary

Work Group

Tasks / Timeline

Discussions

Library

Deal Name:

LoadSure Deal 2

Date Created:

10/4/00

Client Primary Contact:

Mr. M. Sherd

Company Name:

LoadSure

Team Lead:

Jim

Phone Number:

(555) 132-4691

Milestone Summary

Milestone Name

Current Status

Original Request Date

Current Due Date

Actual Completion Date

Milestone Number One

In Progress

12/01/2000

12/15/2000

NA

Milestone Number Two

Completed

11/15/2000

11/15/2000

11/15/2000

Milestone Number Three

Completed

11/15/2000

11/20/2000

11/19/2000

Notifications

Notification of Tasks

Date

Type

Title

1/23/00

Task

Update LoadSure Business Plan

1/23/00

Task

Task Assigned To You

1/23/00

Task

Change In Due Date For Task

1/23/00

Task

Task Past Due - Original Due Date 1/22/00

Notification of Documents

Date

Type

Title

1/23/00

Document

New Document

1/23/00

Document

Document Channel

1/23/00

Document

New Document

Additional System Notifications

Date

Type

Title

1/23/00

Notification

Your Password Must be Changed in two days

1/23/00

Notification

You have been added to the SF Admin Team

1/23/00

Notification

New Deal Team Member

400 →

16
H H G.

[illegible]

17/55

420

Create/Modify Work Group
LoadSure Perl 2 - LoadSure

Summary Deal Team Task Timeline Discussions Alerts Library Profile

Companies to View: View All Companies

Company Role:

Name	Primary Contact	Active	Role	Business Phone	Email	Remove
Leoboda	<input type="text" value="C"/>	<input checked="" type="checkbox"/>	Underwriter	55-577	leoboda@loadsure.com	<input type="button" value="X"/>
Barnes	<input type="text" value="C"/>	<input checked="" type="checkbox"/>	not defined	74-576	leoboda@loadsure.com	<input type="button" value="X"/>
Shine	<input type="text" value="C"/>	<input checked="" type="checkbox"/>	not defined	55-576	leoboda@loadsure.com	<input type="button" value="X"/>

Company Role:

Name	Primary Contact	Active	Role	Business Phone	Email	Remove
Shine	<input type="text" value="C"/>	<input checked="" type="checkbox"/>	not defined	55-577	leoboda@loadsure.com	<input type="button" value="X"/>

Company Role:

Name	Primary Contact	Active	Role	Business Phone	Email	Remove
Shine	<input type="text" value="C"/>	<input checked="" type="checkbox"/>	not defined	55-577	leoboda@loadsure.com	<input type="button" value="X"/>

FIG. 17

18/55

440
✓



Select Company

Select the First Letter: **A B C D E F G H I J K L M N O P Q R S T U V W X Y Z**

Or

Search: Begins With: Contains:

Search

Company Name:

LoadSure
Eagle Financial
XYZ Data Systems

New Company

Cancel Continue

FIG. 18

19/55

460



Company Relationships

Permissions For: Enterprises

Add to Deal Groups:

☐ GE Team ☒ Customer Team ☐ Other ☐ None

Select the companies Enterprises can view on the deal:

Note: This company may only view GE and the companies checked below. Relationships are two-way.

Load/Save



Back

Done

FIG. 19

20/55

480
↙

Select Team Members

GE Capital

Available Users:

Joe
Hanna

Row
Add Selected
Add All

Selected User(s):

Bennie
Tim
Jane

Remove Selected
Remove All

Done

Cancel

FIG. 20

21/55

500

First Name:

Last Name:

Job Title:

Business Phone:

Mobile Phone:

Fax:

Email Address:

Employing Company:

Address 1:

Address 2:

Address 3:

City/Town:

State/Province:

Country:

Zip/Postal Code:

Business Extension:

Division/Sub-Division:

Authority Level:

User ID:

Password:

Retype Password:

* Fields with an asterisk are required.

FIG. 21

22/55

520

User Profile

* First Name:

* Last Name:

Job Title:

* Division/Sub-Division: Division/ Sub-Division

* Authority Level: Authority Level

* Business Phone: Extension:
Exempier 1-455-564 4975 or 71 4410 455 564 7536

Mobile Phone:

Fax:

* Email Address:

* Employing Company: Selected Company

* Address 1:

Address 2:

Address 3:

* City/Town:

* State/Province:

Country:

* Zip/Postal Code:

* User ID: User ID

* Password:
Exempier 1-245-1234 or 123456

* Retype Password:

Reset User Password:


Disable Login: ☐

Add Credentials:
- save (used on HTML documents)

* Fields with an asterik are required

FIG. 22

540



User Profile

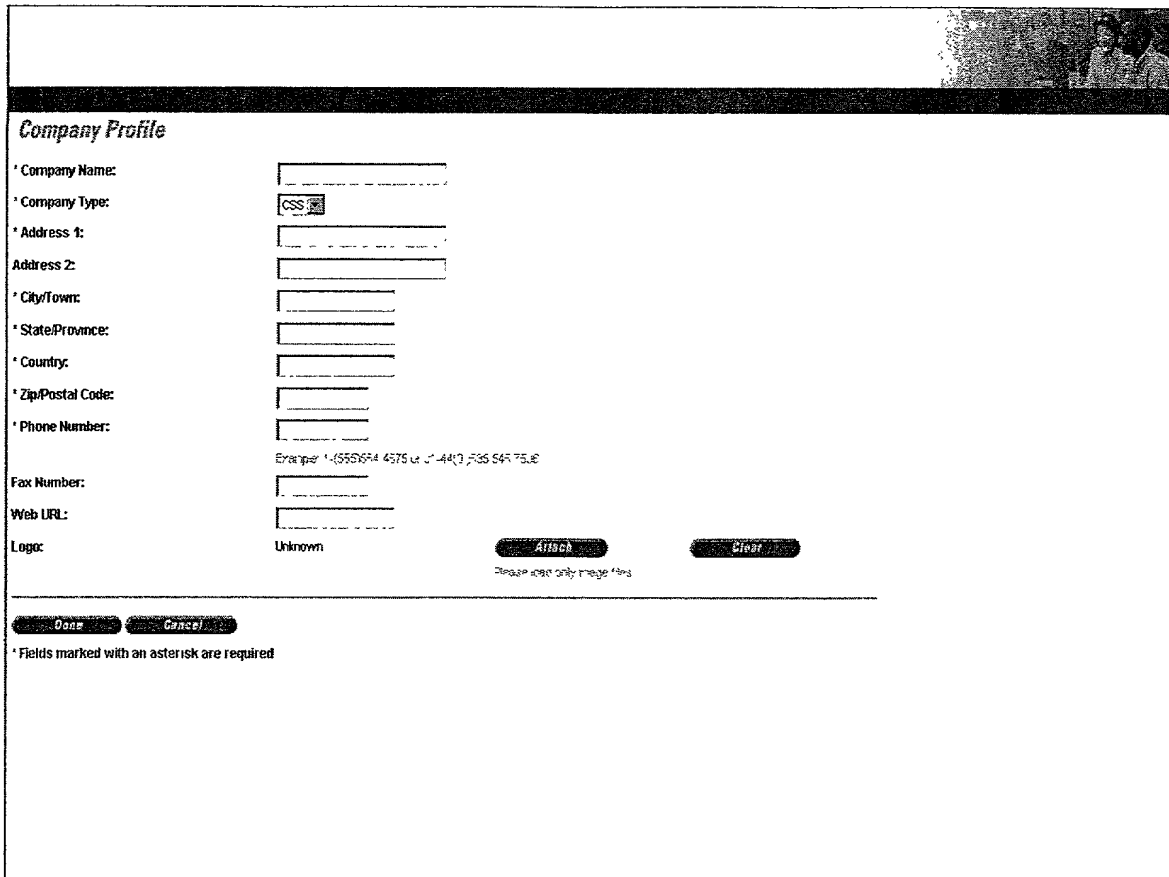
New User

Job Title:	Manager	Extension:	4543
Business Phone:	444-555-9999		
Mobile Phone:	444-555-9999		
Fax:	444-555-9999		
Email Address:	user@kterprises.com		
Employing Company:	G K Enterprises		
Address 1:	Address 1		
Address 2:	Address 2		
City/Town:	City/Town		
State/Province:	State		
Zip/Postal Code:	99999		
Country:	Country		

Done

FIG. 23

24/55



Company Profile

* Company Name:

* Company Type:

* Address 1:

Address 2:

* City/Town:

* State/Province:

* Country:

* Zip/Postal Code:

* Phone Number:

Example: +1(555)644 4575 or +1(443) 535 545 7536

Fax Number:

Web URL:

Logo:

Please use only image files

* Fields marked with an asterisk are required

560

FIG. 24

FIG. 25 is a perspective view of the device in a closed position.

580



Company Profile

G.K. Enterprises


Address 1: Address 1
Address 2: Address 2
City/Town: City/Town
State/Province: State
Country: Country
Zip/Postal Code: 99999
Phone Number: 444-555-9999
Fax Number: 444-555-9999
Web URL: www.gkenterprises.com


Done

25/55


FIG. 25





26/55








Briefing Page
my last login 


Expand All
Collapse All





Deal Dashboard



<input checked="" type="checkbox"/> LoadSure Deal 2 <small>(Click here to view details for this Deal)</small> GE Primary Contact: <u>Tim</u> Phone Number: 730-4691 Your Outstanding Tasks: 6 Notification Summary  (2)  (3)  (5)  (2)	Last Milestone: Proposal Client Primary Contact: <u>Cheryl</u> Phone Number: 132-4691	Actual Completion Date: 15-Dec-2000 Deal Size: \$50,000	Next Milestone: Approval Current Due Date: 15-Jan-2001
---	--	--	---

☐ **e Information -eInfo Financing**



<small>(Click here to view details for this Deal)</small> GE Primary Contact: <u>Todd</u> Phone Number: 730-4691 Your Outstanding Tasks: 5 Notification Summary  (2)  (3)  (5)  (2)	Last Milestone: Proposal Client Primary Contact: <u>Henry</u> Phone Number: (555)132-4691	Actual Completion Date: 01-Jan-2001 Deal Size: \$50,000	Next Milestone: Approval Current Due Date: 02-Jan-2001
--	--	--	---

☐ **e Ship It Direct - e Ship It Financing**



<small>(Click here to view details for this Deal)</small> GE Primary Contact: <u>Todd</u> Phone Number: 730-4691 Your Outstanding Tasks: 5 Notification Summary  (2)  (3)  (5)  (2)	Last Milestone: Proposal Client Primary Contact: <u>Henry</u> Phone Number: (555)132-4691	Actual Completion Date: 01-Jan-2001 Deal Size: \$50,000	Next Milestone: Approval Current Due Date: 02-Jan-2001
--	--	--	---

Alerts 


No new alerts since my last login

Discussion Subscriptions 


No new discussion subscriptions since my last login

HotLinks 

No new items since my last login

Index Card Subscriptions 

No new subscriptions since my last login

News 

Top News
 No news found corresponding to this Section.

↑ 600

FIG. 26

27/55

620



Create/Modify Milestone

*Milestone:

Description:

* Fields with an asterisk are required

Done

Cancel

FIG. 27

640

FIG. 28

29/55

660

Create/Modify Task

Parent Milestone: Milestone 1

*Task:

Description:

Settings:

Owner:

Status:

☐ Hide From External Parties

☐ Omit

Pick an Owner

Select Status

Original

Current

Actual Completion Date

Associations:

Remove

Associate

Done

Cancel

* Fields with an asterisk are required

FIG. 29

30/55

680

Create/Modify Task

Milestone:

Task:

Description:

Qualified Lead

Associations:

Remove

Associate

Done

Cancel

* Fields with an asterisk are required

FIG. 30

700
↙

Create/Modify
Sub-Task

Milestone:

Qualified Lead

Task:

ID Customer CTQ's

*Sub-Task:

Description:

Associations:

Associate

Remove

Done

Cancel

* Fields with an asterisk are required

FIG. 31

720

Task Assignment									
LoadSure Deal 2 - LoadSure									
Summary	Deal Team	Tasks/Inlines	Discussions	Alerts	Library	Profile			
Expand All	Collapse All	Customer Request Date	Current Due Date	Owner	Hide From External Parties	Onit			
Missouri Name									
Task Name1									
Task Name2									
Sub-task Name1									
Sub-task Name2									
Missouri Name									
Task Name1									
Sub-task Name1									
Missouri Name									
Task Name1									
Sub-task Name1									

FIG. 32

33/55

740

FIG. 33

Task Notification

Send Task Notifications through email

☐ Yes ☒ No

Settings for Tasks that I assign to others:

- ☒ Notify me when a Task is Overdue
☐ Notify me when a Task is Reassigned
☐ Notify me when the Due Date is Changed
☐ Notify me when a Task is Complete

Settings for Tasks that I am assigned:

- ☐ Send Task Reminders on Tasks that I am assigned
☐ Send first Notice ☐ day(s) before a task is due
☐ Send follow-up reminders every day until the task is complete
☐ Do Not Send Task Reminders on Tasks that I am assigned

Send Alert Notification through email

☐ Yes ☒ No

Save Close

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	2056	2057	2058	2059	2060	2061	2062	2063	2064	2065	2066	2067	2068	2069	2070	2071	2072	2073	2074	2075	2076	2077	2078	2079	2080	2081	2082	2083	2084	2085	2086	2087	2088	2089	2090	2091	2092	2093	2094	2095	2096	2097	2098	2099	2100	2101	2102	2103	2104	2105	2106	2107	2108	2109	2110	2111	2112	2113	2114	2115	2116	2117	2118	2119	2120	2121	2122	2123	2124	2125	2126	2127	2128	2129	2130	2131	2132	2133	2134	2135	2136	2137	2138	2139	2140	2141	2142	2143	2144	2145	2146	2147	2148	2149	2150	2151	2152	2153	2154	2155	2156	2157	2158	2159	2160	2161	2162	2163	2164	2165	2166	2167	2168	2169	2170	2171	2172	2173	2174	2175	2176	2177	2178	2179	2180	2181	2182	2183	2184	2185	2186	2187	2188	2189	2190	2191	2192	2193	2194	2195	2196	2197	2198	2199	2200	2201	2202	2203	2204	2205	2206	2207	2208	2209	2210	2211	2212	2213	2214	2215	2216	2217	2218	2219	2220	2221	2222	2223	2224	2225	2226	2227	2228	2229	2230	2231	2232	2233	2234	2235	2236	2237	2238	2239	2240	2241	2242	2243	2244	2245	2246	2247	2248	2249	2250	2251	2252	2253	2254	2255	2256	2257	2258	2259	2260	2261	2262	2263	2264	2265	2266	2267	2268	2269	2270	2271	2272	2273	2274	2275	2276	2277	2278	2279	2280	2281	2282	2283	2284	2285	2286	2287	2288	2289	2290	2291	2292	2293	2294	2295	2296	2297	2298	2299	2300	2301	2302	2303	2304	2305	2306	2307	2308	2309	2310	2311	2312	2313	2314	2315	2316	2317	2318	2319	2320	2321	2322	2323	2324	2325	2326	2327	2328	2329	2330	2331	2332	2333	2334	2335	2336	2337	2338	2339	2340	2341	2342	2343	2344	2345	2346	2347	2348	2349	2350	2351	2352	2353	2354	2355	2356	2357	2358	2359	2360	2361	2362	2363	2364	2365	2366	2367	2368	2369	2370	2371	2372	2373	2374	2375	2376	2377	2378	2379	2380	2381	2382	2383	2384	2385	2386	2387	2388	2389	2390	2391	2392	2393	2394	2395	2396	2397	2398	2399	2400	2401	2402	2403	2404	2405	2406	2407	2408	2409	2410	2411	2412	2413	2414	2415	2416	2417	2418	2419	2420	2421	2422	2
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Assign **Create Task**

HHG. 34

FIG. 35

Create Discussion

Discussion Information

Subject:

Details:

Discussion Participation Information

Select Users and Groups

User/Group	Select Participation Level	Remove
User 1	<input type="checkbox"/>	<input type="checkbox"/>
User 2	<input type="checkbox"/>	<input type="checkbox"/>
Group 1	<input type="checkbox"/>	<input type="checkbox"/>

Add Associations:

Select from

* Fields marked with an asterisk are required

780 ↗

35/55

800

Home | Search | About | Contact | Privacy Policy | Terms of Service | Site Map

View Discussion

Back | Manage Access | Delete | Expand All | Collapse All

RFQ for Hydrogen Chloride 1.7m ⁴⁴ , IntelCo 23-Jun-2000

Not yet. I have a few questions first... ¹⁴ , GenChem 26-Jun-2000

We would need an initial shipment of 10,000kg, but from then on it would be weekly shipments of 5,000kg... ¹⁴ , IntelCo 23-Jun-2000

Twice a week would be great, if possible. Sz... ¹⁴ , IntelCo 23-Jun-2000

Clarification on RFQ details: ¹⁴ , GenChem 26-Jun-2000

Yes, the hydrogen chloride can be shipped with the other items. No need for special handling. ¹⁴ , IntelCo 23-Jun-2000

the details for this thread

Reply

Associations: Select item from

Add Selected | Remove

Sample Catalog Document

FIG. 36

840



Feedback
From You

Your feedback has been successfully sent. We highly value your observations and suggestions.
Thank you for taking the time to give us valuable feedback!

Please feel free to give us feedback at any point of your relationship with SPO.
Your opinion means a lot to us!

© 2022

FIG. 38

← 860

Feedback				
VCAC Feedback				
Sent From	Date	Regarding	Comments	
John	01/20/2001	See Status	Enter text is displayed here.	
John	01/20/2001	See Status	Enter text is displayed here.	
John	01/20/2001	See Status	Enter text is displayed here.	

FIG. 39

40/55

888 →

View Library

LoadSure Deal 2 - LoadSure

Summary

Work Group

Tasks/Timeline

Discussions

Library

Expand All

Collapse All

Show this for items that have new updates in the list

Last Logon

Company Folder

Due Diligence

Legal

Financials

Closing

Add Content

Create Folder

FIG. 40

41/55

900 →

Create/Modify Category

Summary Information:

*Parent Folder: Due Diligence

*Folder Name:

*Description:

☒ Inherited Folder

Permission Information:

Select Users and Groups

User/Group

of Group

Customer Group

Other Group

User 1

User 2

Group 1

Permissions

View, Edit, Permission

View, Edit

View

Select Permission

Select Permission

Select Permission

Remove

Done Cancel

* Fields marked with an asterisk are required

FIG 41

FIG. 42.

920

Subscribed:

^ Step1: Enter file name and description.

File Name:

Description:

[illegible]

* Step 2: Select file from local system or enter a URL.

C File Path:

File

URL	Full URL:

URL

*** Step 3: Select a target folder for the file.**

Target folder for file:

Due Diligence

Step 4: Add associations to the file.

Select from

Effect

SAFARI

Step 5: Permission users and groups on the file.

Note These are the default permissions based upon the target folder selected. You may accept the default permissions or modify them in the table below.

Select Users and Groups

User/Group	Permissions	Notify	Remove
User 1	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User 2	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Group 1	View Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>

940

FIG. 43

FIG. 43

Index Card

Subscriber: [redacted]

Summary Information:

* File Name: Legal doc
* Description: These are the legal ramifications for the deal
* Status: Checked-In

Version Information:

Hide Click on the version number to view/download the document

#	Last Modified	Modified by	Comments	Remove
1	02 Nov 2000	Jim	Legal ramifications for the deal	<input type="checkbox"/>
2	03 Nov 2000	Benita	Benita comments on the legal ramifications	<input type="checkbox"/>
3	04 Nov 2000	John	John comments on the legal ramifications	<input type="checkbox"/>

Check Out Lockdown Document

Target Folder Information:

* Target folder for file: Select
Due Diligence

Association Information:

Select from BusinessPlan.doc Remove

Permissions Information:

Select Users and Groups User/Group Permissions Notify Remove

960 →

FIG. 4/4

LoadSure Deal 2 - LoadSure

	Summary	Work Group	Tasks/Timeline	Discussions	Library	Profile
Profile:						
Deal Status:	Deal [] Description []					
Date Closed:	21 Dec-2000					
Approval Level:	Select Approval Level []					
Deal Source:	Select Deal Source []					
PAS 6.0:	Yes [] No []					
PAS 13:	Yes [] No []					
Deal Amounts: (in US\$ MM) Note: \$1,000,000 = \$1.0 SFO Sourced: 0.0 SFO Refined: 0.0 Total Approved Amount: 0.0						
Product:						
Product:	[Select Product]	Type:	[Select Product Type]	Add		
Product Type (All amounts in US\$(MM))	Target Amount	Approved Amount	Funded Amount	Closing ROI	Match Funded	Expiration Date: Remove
Construction Loan	0.0	0.0	0.0		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> 11
Development Loan	0.0	0.0	0.0		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> 11
Remove						
Volume: (All amounts in US\$(MM))						
Select Fiscal Year: FY2001	Q1	Q2	Q3	Q4	Annual Total	Total Funded
Estimate	0.0	0.0	0.0	0.0	\$0.0	\$0.0
Actuals	0.0	0.0	0.0	0.0	\$0.0	\$0.0

980






FIG 45

VOC Summary

46

0001 →

Summary of Issues

Deal ID:	<input type="text"/>	Search Options:	<input type="radio"/> Begins with <input type="radio"/> Includes
Deal Name:	<input type="text"/>	Search Options:	<input type="radio"/> Begins with <input type="radio"/> Includes
Company Name:	<input type="text"/>		
Company Role:	Select Company Role 		
Deal Status:	Select Deal Status 	From: <input type="text"/>	To: <input type="text"/>
SFG Source:	From: <input type="text"/>	To: <input type="text"/>	For: <input type="text"/>
Deal Team Lead:	First Name: <input type="text"/>	Last Name: <input type="text"/>	
Deal Team Member:	First Name: <input type="text"/>	Last Name: <input type="text"/>	
Country/Risk:	Select Country/Risk 		
Division:	Select Division 		
Sub Division:	Select Sub Division 		
Product:	<input type="checkbox"/> Common Stock <input type="checkbox"/> Equity-Current Earning <input type="checkbox"/> Equity-Not Current Earning <input type="checkbox"/> Leveraged Lease <input type="checkbox"/> Limited Partnership		
<input type="checkbox"/> Check to remove deals that contain all selected products			

Search for

1089

55/91

FIG. 47

1020

Search Results

Records (1-15 of 427)
Search Criteria: Deal Status = Active, Company Name = "Lo"

Modify Search Criteria				Next >>		
Deal ID	Deal Name	Company Name	Company Role	Date Created	Status	GE Primary Contact
1311	Loansure Deal 2 Products	Loansure Equity/Credit Leasing Limited Partnership	Intermediary	05/03/00	Active	Tim Stevens
1233	Loan1 Products	Long Preferred United Partners Common Stock	Intermediary	06/21/00	Active	James Lee
1238	LoanCo1 Products	LoanCo United Partnership	Intermediary	06/15/00	Active	Susan Smith
1334	LoanCo1 Products	LoanCo United Partnership	Intermediary	04/25/00	Active	John Ryan
2334	Loan Systems1 Products	Loan Systems Subordinate Loan	Intermediary	04/27/00	Active	Christine Pares
2456	Loan1 Products	Loan Place Co Subordinate Loan	Intermediary	06/03/00	Active	Jim Jones
2657	Loanand1 Products	Loanand Systems Common Stock Subordinate Loan	Intermediary	03/25/00	Active	Jon Jacobs
3455	Loanand1 Products	Loanand Co	Intermediary	03/21/00	Deal	Mark Crawford

55/LH

- GE Home
- GEF Home
- Help
- System Administrator
- Briefing Page
- Catalog
- Alerts
- Discussions
- Tasks
- Industry Template
- Customers
 - My Customers
 - invite Customer
- My GE Services
- News
- Admin
- Logout

Invite/Edit Customer

Customer Information

Company/Prospect:

Location: (city) (state)

Username: (first name) (last name)

Telephone: ###-###-####

Email:

Industry Templates

Select Industry Name:

Upload Custom Attachments:

From Catalog:

From Drive:

New Portal User Pop-up Message

☒ Use default message

Subject:

Details:

FIG 48

New Portal User Pop-up Message

☒ Use default message

Subject:

Details:

Status Indicator

Select Status...

Sales Representative Selector

System Administrator

Assign

Portal Information

URL:

www.mygeooffice.com

Username:

PWD:

Done

Cancel

FIG 49

50/55

GE Capital
Commercial Finance

[Logout](#) | [Preferences](#) | [Help](#) | [Search](#)

[Contact](#)

[Home](#)
[Setup Gateway](#)
[Customer Activity](#)
[Resources](#)
[Company Status](#)
[Content Central](#)

Setup Gateway

Below are the most frequently used tools for creating and maintaining customer gateways.

- [Quick Setup](#)
- [Custom Setup](#)
- [Upload a Document](#)
- [Remove a Document](#)
- [Modify Existing Customer Gateway](#)
- [Preview Customer Gateway](#)
- [Delete Customer Gateway](#)

What's New at CF

The North East Region leads in sales through the end of Q2 and appears to have a strong lead midway through Q3. The B2 Credit Group shows a 12% increase in transactions as compared to Q3 '99. Company-wide, done deals now average 3.1 deals per originator. We're on our way to a record breaking, historic making year. Keep it up!

Customer Activity

Run one of the following activity reports with a single click:

- [Most Active Users](#)
- [Gateways by Company](#)
- [Gateways by User](#)
- [Session Activity](#)

Company Status

CF vs. Goal

Northeast vs. Goal

Content Central

To add content to your customer gateway, please use the listings below.

- [GE Tools & Tours](#)
- [Case Studies](#)
- [Gateway Resources](#)

Resources

Access tools and materials that can help you work smarter:

- [Key Interest Rates](#)
- [EDGARSCAYTM](#)
- [The e-Doctor](#)
- [AICPA Publications Index](#)
- [FinancialWeb.com Company Profiles](#)
- [Forovers.com Company Capsules](#)

[More Resources](#)

[GE Home](#) | [GE Businesses](#) | [Small Business](#) | [Industry Solutions](#)
[Home Solutions](#) | [Personal Finance](#) | [Corporate Info](#)

[Privacy Policy](#) | [Usage Agreement](#) | [Legal Statement](#)
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1100

FIG 50

51/55

GE Capital Commercial Finance

Logoff Preferences Help Search

Contact

Home
Setup Gateway
Customer Activity
Features
Company Status
Content Central

Setup Gateway: Custom Setup

Field with * are required.

Required Information:

*Email Business/Login ID:

*Zip Code:

*Primary Industry:

*Company Name:

*Type of Financing Need:

Login Information:

*Password:

Company Information:

Size of Financing Need:

Status:

#Employees:

Sales Size:

%International Sales:

#Years In Business:

Current Types of Financing Used:

Timing of Additional Finance Need:

Financing Product:

Asset Concentration:

Contact Information:

Prefix:

First Name:

Middle Initial:

Last Name:

Street Address 1:

Street Address 2:

City:

State:

Province:

County:

Country:

Phone Business1:

Extension:

Fax Business:

Title:

←1120

FIG 51

52/55

GE Capital
 Commercial Finance

[Logout](#) | [Preferences](#) | [Help](#) | [Search](#)

[Contact Bob](#)

Prospect Inc Gateway

[Home](#)
[Case Studies](#)
[Resources](#)
[GE Tools & Tours](#)
[Document Central](#)

Message Center

This is a default message when no new messages are there in inbox. This can be changed through DCC. Welcome to a personalized service that provides you with immediate access to GE expertise based upon your specific business needs.

Case Studies

Mold & Tool

Mold & Tool has a multi-layered financial relationship with GE Capital Commercial Finance, which recently helped it refine Full Case Study.

Other relevant case studies:

- [Steelhead technologies](#)

[Show All Case Studies](#)

Spotlight Feature

Tuesday Feature

Our Value Proposition

We are one of only few AAA-rated lenders in the United States, which gives us the stability to view every new customer as the start of the long-term relationship.

Tools & Tours

As a GE customer you will have access to exclusive tools and information designed to streamline the financing process.

- [Credit Line Calculator](#)
Gauge how much you can borrow from Commercial Finance
- [GE Link Demo](#)
Exchange documents to get more efficient access to credit facilities
- [MyGEDeal.com \(Workflow\) Demo](#)
View a demo of your exclusive system for expediting your financing

[Show All GE Tools & Tours](#)

Resources

Here you can find news, trends and useful information to help you make better business decisions:

- [Done Deals](#)
- [Today's Business News](#)
- [Glossary](#)

[Show All Resources](#)

Document Central

Welcome Letter	
Presentation 1	10/12/00
Document 1	10/12/00
Presentation 2	10/12/00
Document - 2	10/12/00

[Show All Documents in My Document Central](#)

[GE Home](#) | [GE Businesses](#) | [Small Business](#) | [Industry Solutions](#)
[Home Solutions](#) | [Personal Finance](#) | [Corporate Info](#)

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← 1140

FIG. 52

53/55

GE Capital Commercial Finance

Logout | Preferences | Help | Search

My Contacts

COMPANY Incorporated Gateway

Message Center

Welcome to your Gateway Page, a personalized service that provides you with immediate access to GE expertise based upon your specific business needs. If you have any questions, your rep is just a click away.

Tools & Tours

As a GE customer you will have access to exclusive tools and information designed to streamline the financing process.

My GE Deal.com Demo
View a demo of our exclusive system for expediting your financing.

GE Link Demo
Exchange documents to get more efficient access to credit facilities.

Credit Line Calculator
Gauge how much you can borrow from Commercial Finance.

[Show All GE Tools & Tours](#)

Spotlight Feature

Periodically updated news/marketing content possible items include:

- Jack Welch's shareholder letter
- Business Credit Advisory Services

Capital Businesses

Cross-selling area, including:

- Featured Business (for example, Commercial Equipment Financing) with brief description; rotated dynamically
- List of 2-3 other companies, each linking out to a more detailed description

Resources

Here you can find news, trends, and useful information to help you make better business decisions.

- Done Deals
- Frequently Asked Questions
- Today's Business News

[More Resources](#)

Document Central

Advantages of Revolvers	9/15/00
Revolver Application	9/8/00
CF Asset Based Lending Guide	9/2/00
Six Sigma	0/31/00

[Show All Documents in Filing Cabinet](#)

Customer Central: Where Your Opinion Counts

- Hotlink To The Customer Advocate (Suggestions, Issues, Complaints)
- Your Dashboard (You've Told Us What's Important - Tell Us How We're Doing)
- New Survey (A Few Questions To Help Us In The Right Direction)

GE Home | GE Businesses | Small Business | Industry Solutions
Home Solutions | Personal Finance | Corporate Info

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1160

FIG. 53

54/55

GE Capital Commercial Finance | [Logout](#) | [Preferences](#) | [Help](#) | [Search](#) | [Contact Bob Jones](#)

COMPANY Incorporated Gateway

Home

Transaction Library

Link 1
Link 2
Link 3
Link 4
[Show All CF Transactions](#)

Financial Solutions Center

Link 2
Link 3
Link 4
[Featured Product](#)

GE Capital Businesses

Link 1
Link 2
Link 3
Link 4
[Featured Business](#)

Case Studies

[Built Technologies](#)
[Environmental Industries](#)
[Vista Food Exchange](#)
[Show All Case Studies](#)

Resources

Link 1
Link 2
Link 3
Link 4
[Show All Resources](#)

Document Central

[Show All Documents](#)

Message Center

Welcome to your Gateway Page, a personalized service that provides you with immediate access to GE expertise based upon your specific business needs. If you have any questions, your rep is just a click away.

Transaction Library

Listing of most recent OR most relevant CF deals, as determined by originator or intermediary customization.

[Show All CF Transactions](#)

Financial Solutions Center

CF product offerings:

- Featured product with brief description; rotated dynamically
- List of other products, each linking out to a more detailed description

Case Studies

Technologies

Facing a liquidity crisis, the company that became Scott Technologies turned to GE Capital Commercial Finance. First to quickly provide the support needed to regain profitability and then to finance its continued and successful growth. Read the full case study.

Video: RealPlayer	28k / 00k
Video: Windows Media Player	28k / 00k

Capital Businesses

Cross-selling area, including:

- Featured Business (for example, Commercial Equipment Financing) with brief description; rotated dynamically
- List of 2-3 other companies, each linking out to a more detailed description

Spotlight Feature

Our Value Proposition

We are one of only a few AAA-rated lenders in the United States which gives us the stability to view every new customer at the start of a long-term relationship.

Find out how our purely 3 to 5 approach makes us significantly different from a bank.

Document Central

Advantages of Revolvers	6/15/00
Revolver Application	9/8/00
CF Asset Based Lending Guide	9/2/00
Six Sigma	8/31/00

[Show All Documents in Filing Cabinet](#)

Other relevant case studies:

[Environmental Industries](#)
[Vista Food Exchange](#)

[Show All Case Studies](#)

Resources

Here you can find news, trends and useful information to help you make better business decisions.

- [Dinn Dinn](#)
- [Frequently Asked Questions](#)
- [Today's Business News](#)

[More Resources](#)

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FIG. 54

55/55

1200

THE "GATEWAY"

GE Capital
Commercial Finance

Logoff | Preferences | Help | Search

GE Directory List

Customer Co	49 sessions
	7 sessions
Brian	Gateway setup on Nov 27, 2000
	First login date Nov 27, 2000

Feature	30 days	31-60 days	61-90 days	Total	Date of Last Hit
The Food Exchange	3	0	0	3	Nov 27, 2000
Country Golf	2	0	0	2	Nov 27, 2000
Access GE	2	0	0	2	Nov 27, 2000
Supply Chain Management	1	0	0	1	Nov 27, 2000
Joe's Seafood	1	0	0	1	Nov 27, 2000
Letter to Share Owners!	1	0	0	1	Nov 27, 2000
Resource-5	1	0	0	1	Nov 27, 2000
GE link Demo	1	0	0	1	Nov 27, 2000
Workflow Demo	1	0	0	1	Nov 27, 2000
Total	13	0	0	13	

FIG. 55